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The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index and Nielsen Station Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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NIELSEN TELEVISION 1981

Tremendous change has been taking place in television: the growth of cable TV, pay TV, satellite communications, the use of videocassette recorders, the introduction of video disks and the advent of information services such as Videotext and Viewdata. But, there is still one basic fact that stands out — America's households are watching more television than ever. For calendar year 1980, the average was a record 6 hours, 36 minutes of TV usage per U.S. household.

Nielsen has been on the scene since the beginning — documenting TV's growth and reporting on the changes that have been taking place.

We are especially grateful for the continued support we have received from the many clients we serve — commercial and public broadcasters, cablecasters, agencies, advertisers, producers and syndicators. All have contributed much to both our national and local television research services.

Each year we have provided a summary of the television year for our clients and other interested parties. We trust you will find this, our 26th report, as interesting as our previous editions.

James D. Lyons

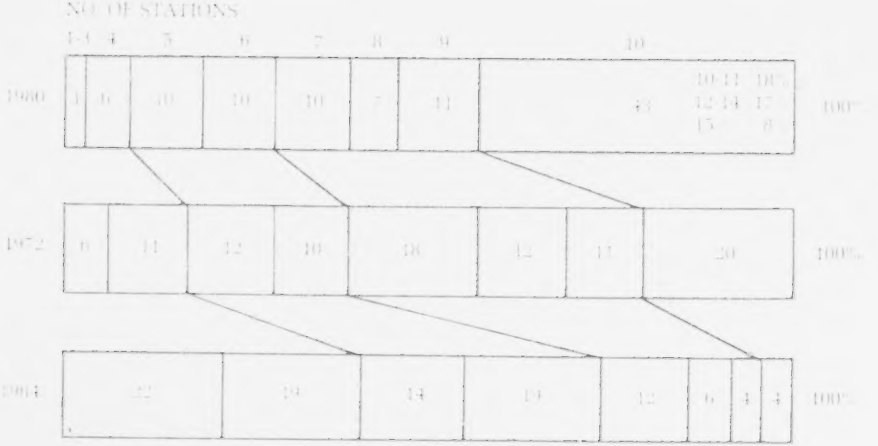
James D. Lyons
President
Media Research Group

INCREASING NUMBER OF STATIONS AVAILABLE

According to the Federal Communications Commission there were 1,021 television stations on the air . . . 753 commercial and 268 public . . . as of January 1, 1981.

Over 50% of the TV households in the country can now receive signals from 9 or more stations and 8% can tune to 15 or more. The increase is due in part to the expansion of cable bringing multiple channel service to many households.

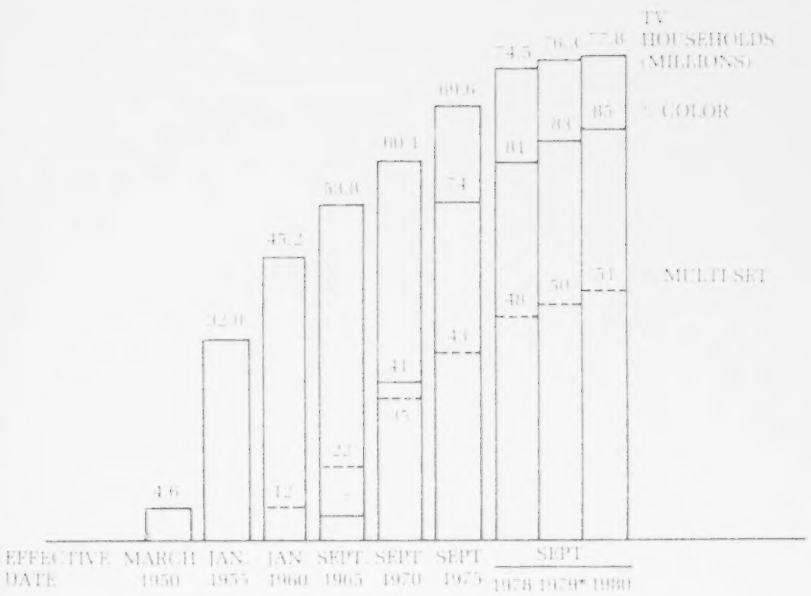
STATIONS RECEIVABLE PER TV HOUSEHOLD
SHARE OF TV HOUSEHOLDS



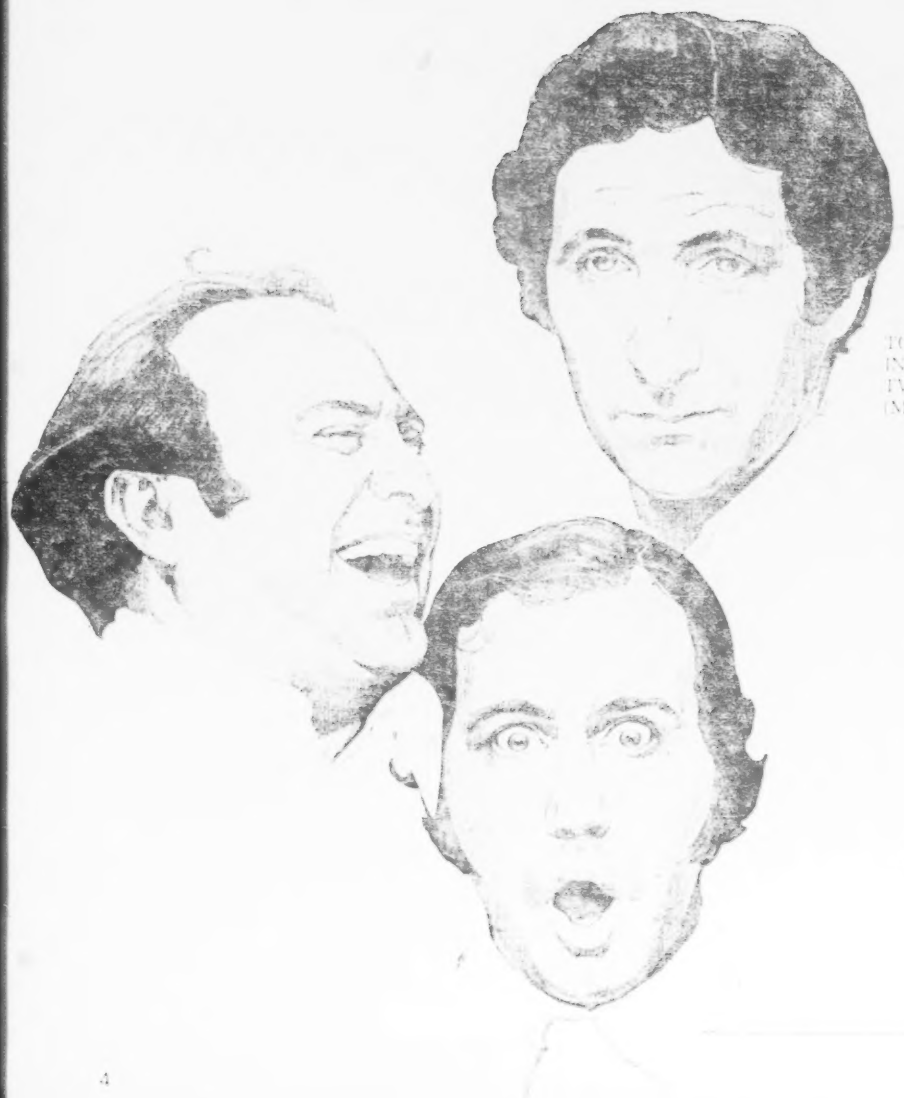
SOURCE: NTI SAMPLE

TV OWNERSHIP CONTINUES AT 98%; 85% NOW OWN COLOR TV

Nielsen estimates some 77.8 million U.S. households owned at least one TV set as of January 1981. More than half owned more than 1 set and color set ownership continued to increase to the 85% level.

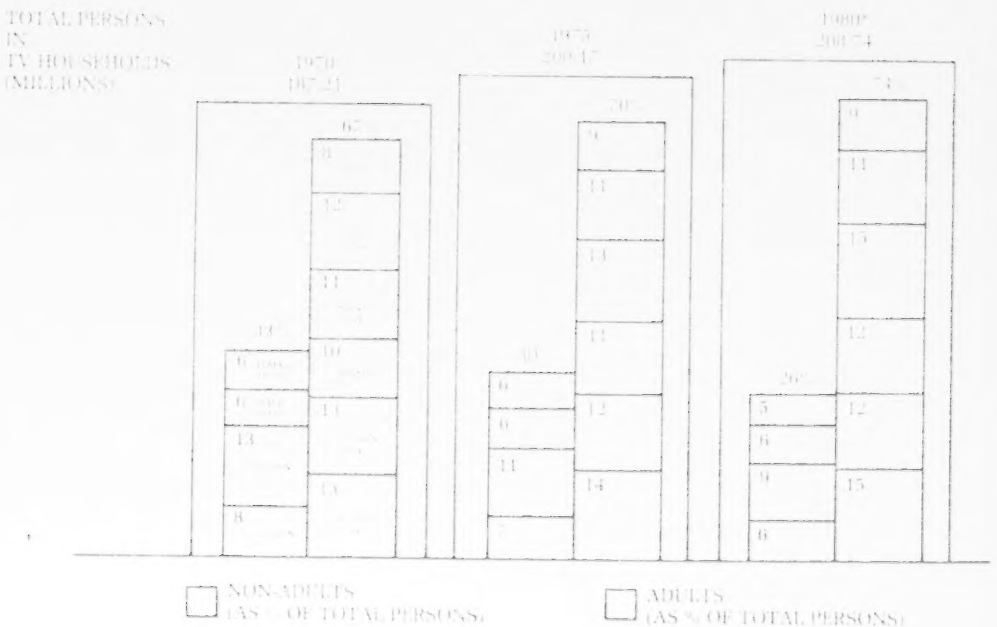


TV OWNERSHIP: U.S. CENSUS 1950-'70; NIELSEN ESTIMATES 1975-'80
COLOR: ARF CENSUS 1965; NIELSEN ESTIMATES 1970-'80
MULTI-SET: U.S. CENSUS 1960-'65; NIELSEN ESTIMATES 1970-'80
* AS OF 1979, ESTIMATES BASED ON JAN. 1 OF FOLLOWING YEAR, EFFECTIVE IN SEPT.



MORE ADULTS, FEWER NON-ADULTS IN TV HOUSEHOLDS

The total number of persons in TV households has increased 12% in the last 10 years and the ratio of adults (18 and over) to non-adults has increased from 2.3 to 3.1. Adults now comprise nearly 75% of our population.


TOTAL PERSONS IN TV HOUSEHOLDS (MILLIONS)*
1970* 187.21
1975* 200.47
1980* 208.74
NON-ADULTS (AS % OF TOTAL PERSONS)
ADULTS (AS % OF TOTAL PERSONS)

*BASED ON JAN. 1, 1981; OTHERS BASED ON SEPT. 1 EACH YEAR

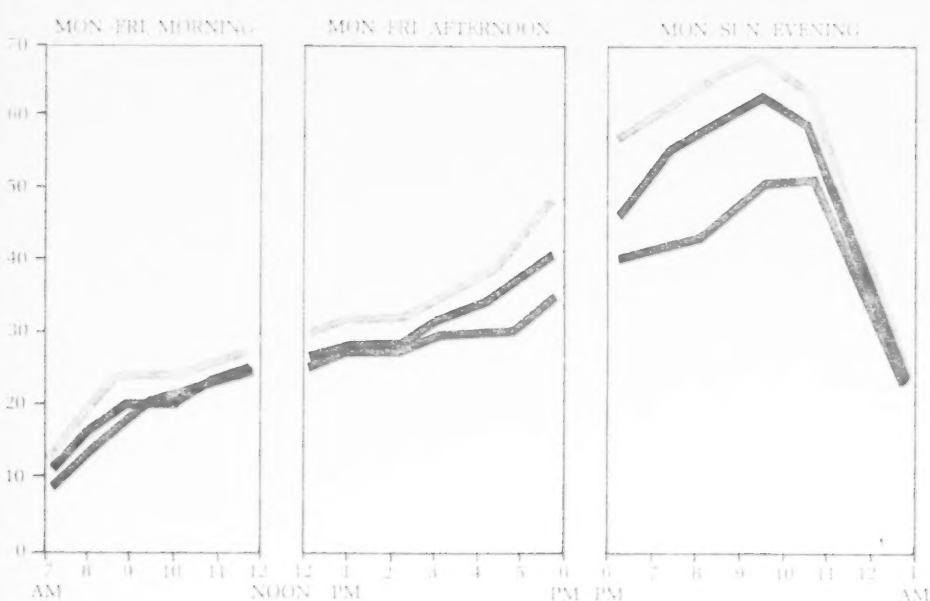
BEST AVAILABLE COPY

TV VIEWING PEAKS IN MID-EVENING

Television viewing levels increase throughout the day, reaching a peak generally between 8PM and 10PM. Thereafter, a sharp decline sets in as people go to bed.

Variation in TV usage levels from winter to summer are quite dramatic in late afternoon and evening hours but less so in early morning and late night hours.

PERCENT OF TV HOUSEHOLDS USING TELEVISION



SEPT.-'79/AUG.-'80 AVG. FEB.-'80 JULY-'80

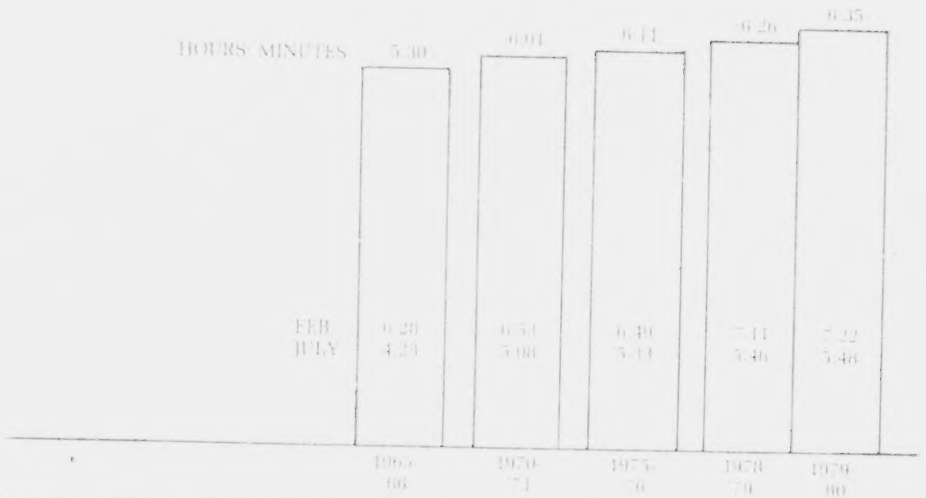
NIELSEN ESTIMATES — TOTAL U.S. N.Y. TIME, EXCEPT N.Y.T. — 3 HOURS IN PACIFIC TERRITORY

HOUSEHOLD USAGE CONTINUES TO BREAK RECORDS . . .

OVER 6 1/2 HOURS DAILY

TV households, on the average, viewed an estimated 6 hours and 35 minutes a day during the 1979-80 season, the highest season average ever reported. This represented a 9 minute increase on an annual basis and the mid-winter month of February exhibited an 11 minute jump.

AVERAGE HOURS OF HOUSEHOLD TV USAGE PER DAY



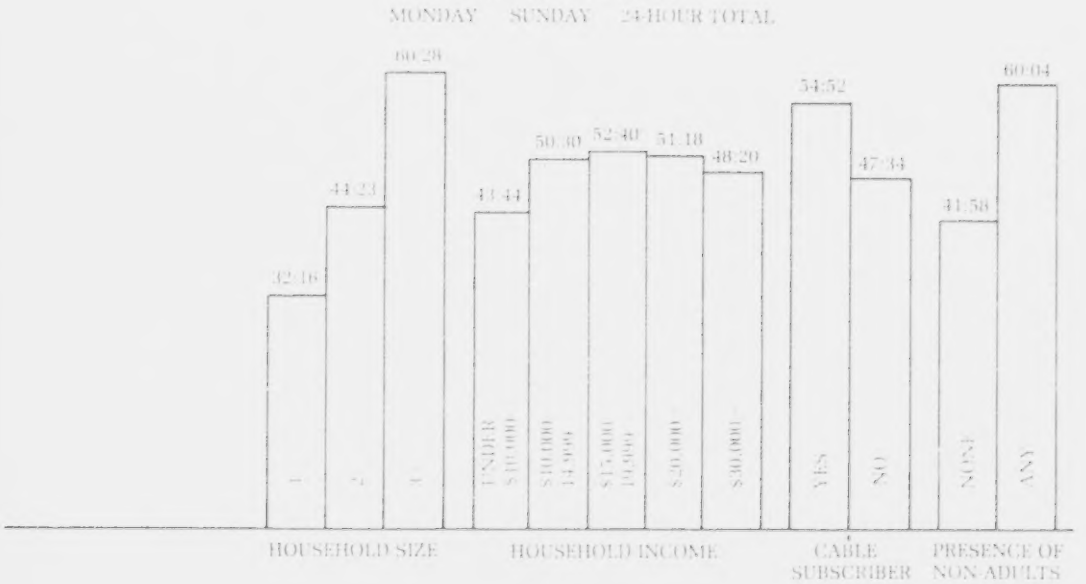
NIELSEN ESTIMATES BASED ON TOTAL U.S. TV HOUSEHOLDS
SEPT./AUG. 48 WEEK AVERAGE, EXCLUDING UNUSUAL DAYS

TV USAGE GREATER AMONG

- —LARGER HOUSEHOLDS
- —HOUSEHOLDS WITH NON-ADULTS
- —CABLE HOUSEHOLDS

While the average household viewed over 49 hours of television per week in the fall of 1980, certain types viewed considerably more hours. Households with 3 or more people and those with non-adults watched over 60 hours a week. Cable subscribing households viewed about 7 hours a week more than non-cable households.

HOURS OF TV USAGE PER WEEK BY HOUSEHOLD CHARACTERISTICS

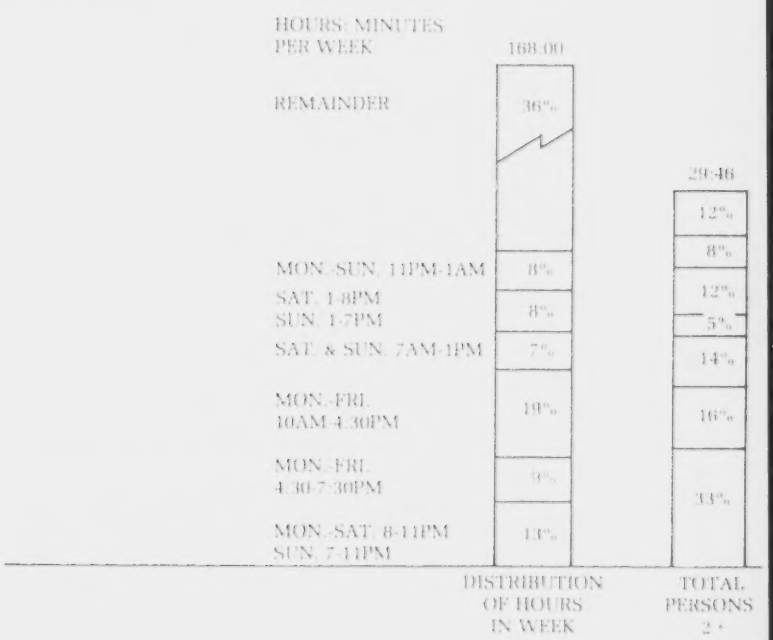


NIELSEN ESTIMATES: NATIONAL AUDIENCE DEMOGRAPHICS REPORT NOVEMBER 1980

OLDER WOMEN VIEW MOST . . . FEMALE TEENS LEAST

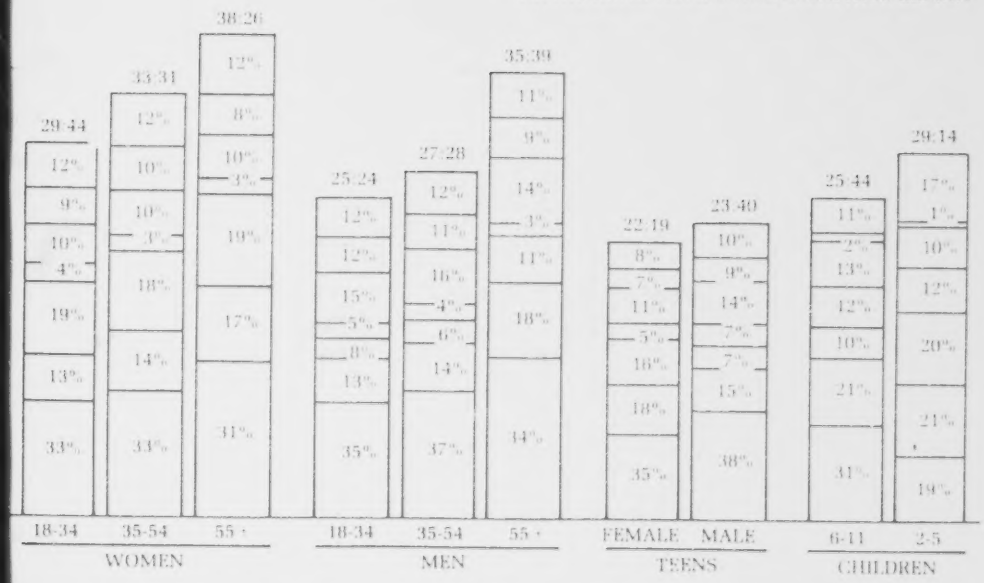
As a general rule, women view more television than men, and older men and women view more than those younger. Also young children view more than those older and teenagers.

WEEKLY VIEWING ACTIVITY FOR WOMEN, MEN, TEENS AND CHILDREN
NOVEMBER 1980



Viewing activity is distributed disproportionately throughout the day reflecting the relative availability of each age group. For example, prime time (Monday-Saturday, 8:00-11:00PM & Sunday, 7:00-11:00PM) makes up only 13% of the week's total hours, yet with the exception of children 2-5, accounts for 30% or more of people's viewing.

NIELSEN ESTIMATES
NATIONAL AUDIENCE DEMOGRAPHICS REPORT

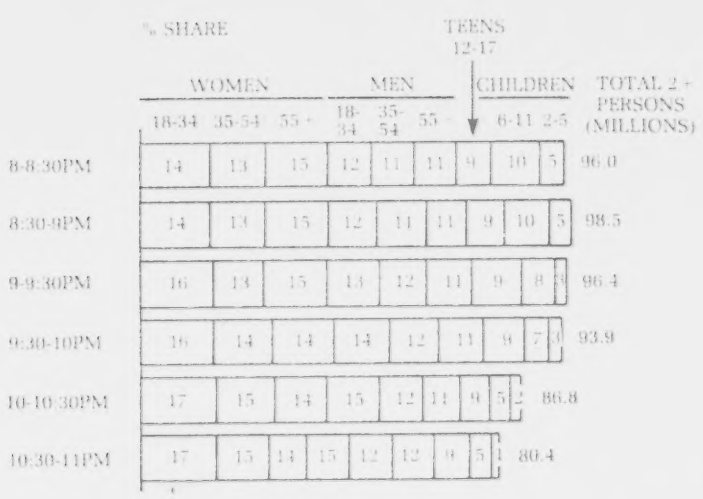


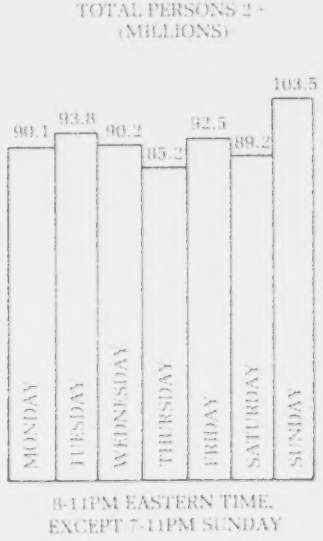
SUNDAY NIGHT . . . 8:30-9PM
MOST POPULAR VIEWING TIMES

Year after year Sunday evening continues to attract the greatest number of viewers . . . nearly 10 million more than the next most popular night, Tuesday.

The 8:30 to 9:00PM time slot is the most viewed evening (Mon.-Sun.) half-hour period, and women account for the greatest share of viewing throughout the evening.

PERSONS VIEWING PRIME TIME
(AVERAGE MINUTE)





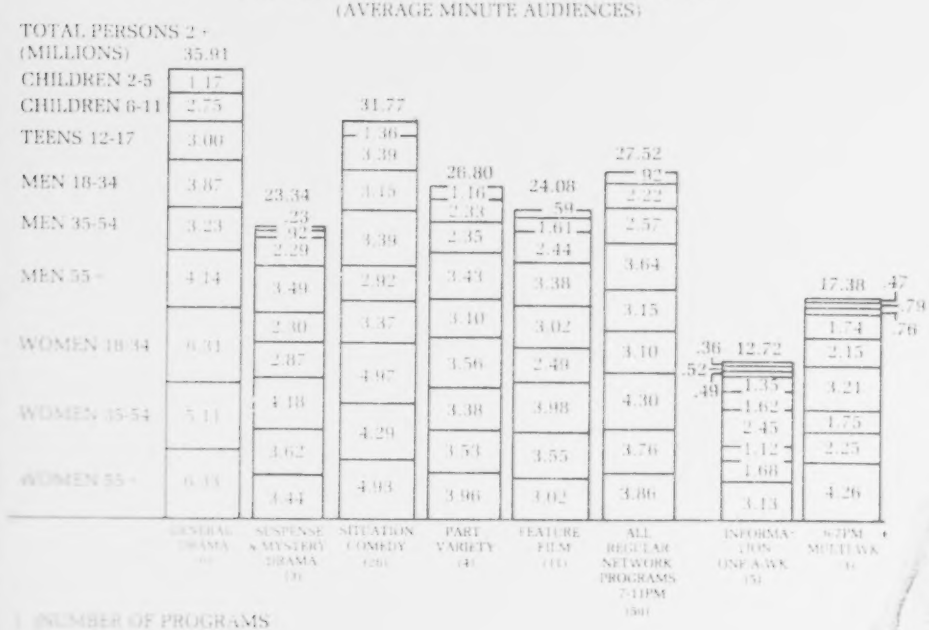
NOVEMBER 1980, EXCLUDING UNUSUAL DAYS

GENERAL DRAMAS MOST POPULAR PROGRAM TYPE

General Drama programming out-pulled situation comedies during prime time in the fall of 1980 registering the largest overall audience average, as well as the high levels for each adult age sex category. Situation Comedies, however, continued to rate highest with children and teens.

AUDIENCE COMPOSITION BY SELECTED PROGRAM TYPE

NETWORK PROGRAMS 6-11PM — NOVEMBER 1980
(AVERAGE MINUTE AUDIENCES)



1 NUMBER OF PROGRAMS

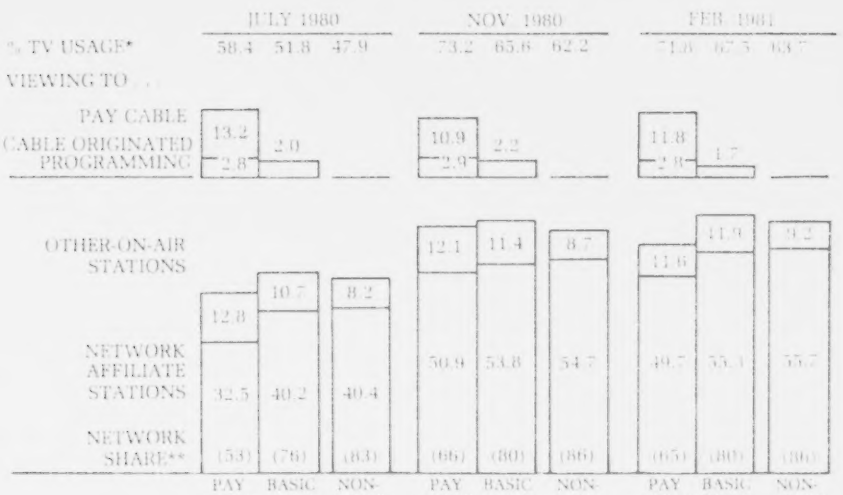
CABLE HOUSEHOLDS VIEW MORE TV THAN NON-CABLE

The number of TV households subscribing to Cable Television systems has been growing steadily. Currently between 20-30% are able to view the extensive cable offerings.

Both basic cable and pay cable subscribers, in general tend to view more television than non-cable households and the level of viewing to other-on-air stations (independents, public and subscription TV) is also higher among cable households.

SOURCE OF HOUSEHOLD VIEWING—PRIME TIME (MON.-SUN. 8-11PM)

PAY CABLE, BASIC CABLE AND NON-CABLE HOUSEHOLDS



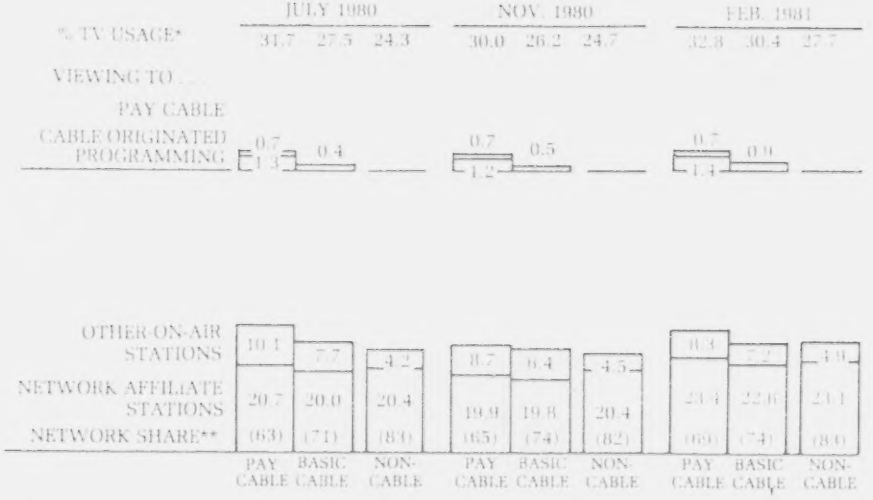
* MAY BE LESS THAN SUM OF RECEPTION SOURCES BECAUSE OF SIMULTANEOUS VIEWING
** % NETWORK SUM OF SOURCES

NIELSEN TELEVISION INDEX ESTIMATES

During prime time, a sizeable portion of the viewing of pay cable households is to the pay cable offerings, usually first run uncut movies.

In the daytime hours (M-F 10AM-4:30PM) pay cable offerings are less and other cable originated programming becomes a more important factor.

SOURCE OF HOUSEHOLD VIEWING — WEEKDAY DAYTIME (MON.-FRI. 10AM-4:30PM)
PAY CABLE, BASIC CABLE AND NON-CABLE HOUSEHOLDS



* MAY BE LESS THAN SUM OF RECEPTION SOURCES BECAUSE OF SIMULTANEOUS VIEWING
** % NETWORK SUM OF SOURCES

NIELSEN TELEVISION INDEX ESTIMATES

TOP 10 SYNDICATED PROGRAMS

Currently there are well over 300 different programs which independent distributing organizations offer for sale to individual local stations, including network affiliates as well as independent stations. Many of these programs were at one time on network schedules, and many have never been seen on TV as other than "syndicated" programs. As a result, individual stations can supplement network offerings, provide diverse regional programs and offer national programs attuned to the preferences of the local area. The top 10 syndicated programs among different segments of our population, are listed here. The programs are ranked on the basis of their average quarter-hour audience ratings for the total U.S., as reported by Nielsen Station Index during November 1980.

RANKING OF SYNDICATED TV PROGRAMS

BASED ON NIELSEN STATION INDEX
NOVEMBER 1980
REPORT ON SYNDICATED PROGRAMS

TOTAL U.S. HOUSEHOLDS

PROGRAM NAME	RATING (% U.S.)
M*A*S*H	12.8
MUPPETS	12.0
HEE HAW	9.9
FAMILY FEUD PM	9.7
HAPPY DAYS, AGAIN	9.3
TIC TAC DOUGH	8.9
LAWRENCE WELK	8.8
PM MAGAZINE	8.7
DONAHUE SHOW	6.6
SANFORD & SON	6.3

WOMEN 18+

PROGRAM NAME	RATING (% U.S.)
M*A*S*H	8.8
MUPPETS	8.3
FAMILY FEUD PM	8.1
LAWRENCE WELK	8.0
HEE HAW	7.7
TIC TAC DOUGH	7.6
PM MAGAZINE	6.8
DONAHUE SHOW	5.5
HAPPY DAYS, AGAIN	5.0
JOKERS WILD	4.7

MEN 18+

PROGRAM NAME	RATING (% U.S.)
M*A*S*H	8.7
HEE HAW	7.5
MUPPETS	7.4
FAMILY FEUD PM	6.1
PM MAGAZINE	6.0
LAWRENCE WELK	5.4
TIC TAC DOUGH	5.4
HAPPY DAYS, AGAIN	4.1
SANFORD & SON	3.7
ALL IN THE FAMILY	3.6

TEENS 12-17

PROGRAM NAME	RATING (% U.S.)
HAPPY DAYS, AGAIN	11.7
M*A*S*H	9.1
MUPPETS	8.3
SANFORD & SON	6.3
SOLID GOLD	5.9
GOOD TIMES	5.7
WELCOME BACK, KOTTER	5.7
FAMILY FEUD PM	4.8
DANCE FEVER	4.7
HEE HAW	4.6

CHILDREN 2-11

PROGRAM NAME	RATING (% U.S.)
MUPPETS	17.1
HAPPY DAYS, AGAIN	12.3
TOM AND JERRY	10.8
BUGS BUNNY	8.4
FLINTSTONES	7.2
GILLIGAN'S ISLAND	6.7
M*A*S*H	6.7
WOODY WOODPECKER	6.5
SANFORD & SON	6.5
SHA NA NA	4.5

NIELSEN TOP 15 PROGRAMS

Many different programs rank in television's top 15 in the course of a year. Those shown here were the regular network programs that ranked in the top 15 during Nielsen Television Index measurements from October 27 through November 23, 1980. The size of a program's audience is but one of a number of ways to assess its worth or success. For example, many programs below the top 15 or 20 are successful because they appeal to a specific target audience that advertisers wish to reach.

TOTAL U.S. HOUSEHOLDS

PROGRAM NAME	AVERAGE AUDIENCE %
DALLAS	34.9
60 MINUTES	28.3
DUKES OF HAZZARD	26.7
LOVE BOAT	25.7
ALICE	25.6
ONE DAY AT A TIME	25.2
JEFFERSONS	25.2
HAPPY DAYS	24.4
ARCHIE BUNKER'S PLACE	24.2
THREE'S COMPANY	23.3
LAVERNE & SHIRLEY	23.0
NBC TUES. NT. MOVIE	22.6
TOO CLOSE FOR COMFORT	22.1
LITTLE HOUSE—PRAIRIE	22.1
M*A*S*H	22.0

WOMEN 18 +

DALLAS	31.8
ALICE	22.0
ONE DAY AT A TIME	21.9
JEFFERSONS	21.9
60 MINUTES	21.7
ARCHIE BUNKER'S PLACE	21.4
LOVE BOAT	21.4
DUKES OF HAZZARD	21.1
HAPPY DAYS	18.0
FANTASY ISLAND	17.8
LITTLE HOUSE—PRAIRIE	17.8
THREE'S COMPANY	17.6
M*A*S*H	17.6
LAVERNE & SHIRLEY	17.6
DIFF'RENT STROKES	16.6

MEN 18 +

PROGRAM NAME	AVERAGE AUDIENCE %
DALLAS	23.3
60 MINUTES	21.6
NFL MON. NT. FOOTBALL	19.8
DUKES OF HAZZARD	18.6
NFL FOOTBALL GAME 2-NBC	18.4
THAT'S INCREDIBLE	16.7
ARCHIE BUNKER'S PLACE	16.5
ONE DAY AT A TIME	16.3
CBS NFL FOOTBALL GAME 1	16.2
NBC TUES. NT. MOVIE	15.9
JEFFERSONS	15.8
BIG EVENT	15.7
ALICE	15.5
ABC SUN. NT. MOVIE	15.3
LOVE BOAT	15.2

TEENS 12-17

ABC SUN. NT. MOVIE	19.8
DIFF'RENT STROKES	19.7
HAPPY DAYS	19.6
DALLAS	19.3
DUKES OF HAZZARD	18.7
NBC TUES. NT. MOVIE	18.3
MORK & MINDY	18.0
LOVE BOAT	17.6
DISNEY'S WONDERFUL WORLD	16.9
THREE'S COMPANY	16.7
LAVERNE & SHIRLEY	16.7
ENOS	16.3
SOAP	16.0
M*A*S*H	14.9
FANTASY ISLAND	14.6

TOP 15 REGULARLY SCHEDULED NETWORK PROGRAMS

NOVEMBER 1980
NIELSEN AVERAGE AUDIENCE ESTIMATES
2 OR MORE TELECASTS
(15 MINUTES OR LONGER)

CHILDREN 2-11

PROGRAM NAME	AVERAGE AUDIENCE %
DUKES OF HAZZARD	30.7
DISNEY'S WONDERFUL WORLD	29.3
INCREDIBLE HULK	25.5
HAPPY DAYS	24.7
LOVE BOAT	23.3
LAVERNE & SHIRLEY	22.0
ENOS	20.5
RICHIE RICH	20.3
MORK & MINDY	20.2
FONZ/HAPPY DAYS GANGS	19.3
SCOOBY & SCRAPPY DOO	18.5
BUGS BUNNY/ROAD RUNNER 2	18.1
BUGS BUNNY/ROAD RUNNER 3	17.4
LITTLE HOUSE—PRAIRIE	17.3
DALLAS	16.8

1980-81 ELECTION/INAUGURATION AUDIENCE

The fall and winter of 1980-81 saw the country electing and inaugurating a new president.

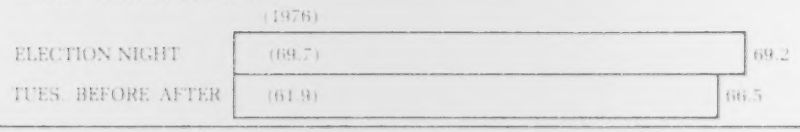
The 1980 election coverage on network TV ran 7.7 hours from 7PM until 2:44AM NYT . . . one hour less than for the close 1976 election.

Though television usage on election night was above average (+4%) it was not as high as for the last presidential election in 1976.

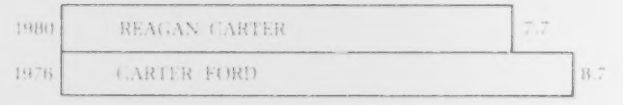
In the case of inauguration activities, however, the Reagan-Bush proceedings produced larger audiences than in 1976 and over 40% higher than the same day for the preceding and following 1981 weeks. These higher levels were no doubt due in part to the fact that the U.S. hostages were released on this same day.

ELECTION NIGHT – 1980 7PM-11PM

% HOUSEHOLDS USING TV



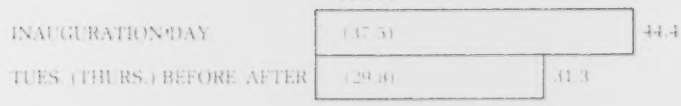
HOURS OF ELECTION COVERAGE AIRED ON NETWORK TV*



*INCLUDES LOCAL CUT INS AND REGULAR LATE NIGHT NEWS

INAUGURATION DAY – 1981 10AM-5PM

% HOUSEHOLDS USING TV



NIELSEN TELEVISION SERVICES

IN THE UNITED STATES . . .
Nielsen Television Index (NTI) provides continuing estimates of TV viewing and national sponsored network program audiences, including national ratings 52 weeks per year. Data regularly reported include persons audiences and household audiences by market sections. Daily Ratings, Fast National and Multi-Network Area Ratings, Cost/1000 Estimates and Program and Brand Cumulative Audiences. In addition, the National Audience Demographics Report provides estimates of audiences by persons categories within household demographics. NTI's DATA COMMAND multiphase time-sharing computer systems offer clients direct access to a wide range of network program analyses.

Nielsen Station Index (NSI) measures television station audiences in over 200 local markets and provides season-to-season reports (up to seven per market per year), on viewing by time periods and programs. NSI measurements include Metro Area and Designated Market Area (DMA) ratings, Station Total audiences, program pre-emptions, cumulative audiences and "times viewed," and estimates of viewing over a wide range of demographic categories.

Metered Market Service provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago and San Francisco via a sample of households with Audimeter* instruments linked directly to Nielsen computers.

IN CANADA . . .
Nielsen Broadcast Index (NBI) is the Canadian counterpart of the Nielsen Station Index in the United States. NBI measures television station audiences in the 41 DMA's that comprise the total Canadian national market. NBI report frequency varies from 3-18 weeks depending on market size. Report book features include demographics, special vs. regular time period listings, trends, cumes, week-by-week ratings and metro area ratings for major reports.

Nielsen Television Index (NTI) publishes network television audience measurement reports for 37 weeks of the year. These reports cover all programs carried on Canadian networks: CBC, CTV, Global, Radio-Canada and TVA.

IN BELGIUM . . .
Diary measurement of national audiences two months per year.

IN ITALY . . .
National audience reports, both monthly and quarterly, are provided nine months per year based on diary measurements. They include the national networks, foreign stations, and all local stations combined.

Twice a year, the local service reports on household and viewing activity for all major stations in 9 major regions.

IN JAPAN . . .
Nielsen Station Index was established there in 1960 and produces Metered Market measurements for the Tokyo, Osaka and Nagoya areas and diary measurements for 7 other markets.